COUNTERMEASURE TRACKING SYSTEMS (CTS)

INVENTORY MANAGEMENT AND TRACKING SYSTEM (IMATS)

RELEASE NOTES (RELEASE 1.7)

November 2014

1 INTRODUCTION

CTS IMATS Release Notes (Release 1.7) provides an overview of enhancements and bug fixes included in Release 1.7 of the Countermeasure Tracking Systems (CTS) Inventory Management and Tracking System (IMATS).

This document contains the following:

- IMATS background

- Brief description of the system

- List of compatible products

- Procedures for accessing the system

- Description of enhancements

- Description of bug fixes

2 BACKGROUND

The Division of Strategic National Stockpile (DSNS) in the Office of Public Health Preparedness and Response (OPHPR) joined efforts in September, 2010 with the Division of Health Informatics and Surveillance (DHIS) CTS team for the development of the first version of this program.

The program was designed to address the inventory management and reporting needs raised during the 2009 H1N1 Influenza pandemic response and to improve inventory management and reporting in subsequent emergency responses.

The CTS team is currently part of the Center for Surveillance, Epidemiology and Laboratory Services (CSELS).

3 DESCRIPTION OF SYSTEM RELEASE

CTS IMATS supports the Centers for Disease Control and Prevention (CDC) mission to protect and keep our nation safe during all-hazards events (e. g., pandemic influenza and terrorist attack).

IMATS is one of four system components within CTS. The IMATS solution provides state and local public health providers with a tool to track medical and non-medical countermeasure inventory and supplies during daily operations or an event.

IMATS also tracks quantities of inventory and facilitates warehouse operations including receiving, staging, and storing of inventory.

4 COMPATIBLE PRODUCTS

This product has successfully passed testing with Microsoft Internet Explorer versions 8.0 and 9.0 (and version 10.0 running in Version 8.0 or 9.0 Compatibility mode). Cookies and JavaScript must be enabled.

5 ACCESSING IMATS AND IMATS CONNECT

- Accessing IMATS

  Users can access IMATS Release 1.7 at **https://imats.cdc.gov**.

  To use the system, users must have a valid email address and be identity-proofed through the Secure Access Management System (SAMS). No workstation changes are required.

- Accessing IMATS Connect

  To use the system, users must have a valid email address. For instructions on installing the application, users should refer to one of the following guides:

  - *CTS_IMATS_Connect_Installation_Guide-Manual_Installation_Release_1.7.pdf*

  - *CTS_IMATS_Connect_Installation_Guide-Using_the_Installer_Release_1.7.pdf*

6 DESCRIPTION OF ENHANCEMENTS

IMATS Release 1.7 contains the enhancements described below.

6.1 UPDATED EXPORT FEATURE

The Export feature now provides the ability to export data into a tab-separated values (TSV) file.

6.2 EXPORT FUNCTION ADDED TO PUT AWAY LISTS

When viewing a put away list, the user now has the option to export the list to a Microsoft Excel spreadsheet.

6.3 NEW ADD & COPY FUNCTIONALITY IN THE RECEIPTS FEATURE

An **Add & Copy** button has been added to the **Add Receipt Details** page. When a user enters an item and then clicks this button, IMATS saves the item and keeps its details displayed on the screen.

This allows the user to quickly add another product of the same type that has the same details.

6.4 MODIFIED FACILITY-LEVEL CUSTOM ROLE NAMES

To help avoid confusion when adding a user to IMATS, the **Role** field includes the facility name next to facility-level roles that aren't assigned to all facilities.

For example, assume a facility-level role named **Custom Role** is assigned to facilities A, B, and C. In the **Role** field, the following roles will display:

- Custom Role (Facility A)

- Custom Role (Facility B)

- Custom Role (Facility C)

6.5 IMPORT FILE MODIFICATIONS

Several changes have been made to some of the files that are imported into IMATS. The changes are listed below.

- Import Storage Locations: Added the **Location Type**, **Location Type Other**, and **Receipts Only** fields

- Import Units of Measure: Added the **Standard UOM** and **Units per UOM** fields

- Import Inventory Data: Added the **Serial Number** field

- Import Products: The **Manufacturer** field is no longer required

- Import Facilities: Added the **Latitude** and **Longitude** fields. Also, the secondary point of contact information is no longer required

- Import Suppliers: The **E-mail** field is no longer required. Also, added the option to include the supplier's address

6.6   COUNT INVENTORY REPORT ENHANCEMENTS

The following improvements were made to the Count Inventory Report:

- To alleviate confusion when selecting facilities, the user can now select either the **All Facilities** option or specify one or more specific facilities. Previously, both options could be selected.

- An **All Products** check box has been added, which allows the user to search on all products in all facilities.

- For Public Health Administrators running the report, a check box has been added that gives the option to report on products that are currently in inventory, instead of all the products configured in IMATS.

   This option is also available to Facility Administrators, as it was implemented in a previous release.

- In the report, the **Package Size** and **Package Type** columns have been replaced with **UOM** and **Units per UOM** columns.

- For ease of use when performing mathematical computations in the Excel version of the report, number fields are now saved as numbers instead of text.

- The facility name(s) no longer display at the top of the report.

- The report now prints in Landscape mode.

6.7   UPDATED MENU SYSTEM

The following enhancements have been made to the menu system:

- To navigate the menu, the user now clicks on an item, instead of hovering the mouse over it.

   This new method stops the menu from disappearing if the user moves the mouse away from the item.

- The Storage Locations feature is now located under **Setup > Facility** (it previously had its own menu item).

   This enhancement helps prevent the misunderstanding that a storage location is a warehouse instead of a location within a facility.

6.8 ADDITIONAL INFORMATION PROVIDED ON THE PRINTED PICK LIST

The following items have been added to the information that displays at the top of a printed pick list:

- Address of the ordering facility

- Point of contact at the order facility

- Any notes that were entered on the pick list

6.9 DETAILS ADDED TO REQUEST ITEMS

When the user adds an item to a product request, the hyperlinked product name that displays on the right side of the page now includes the quantity and unit of measure.

6.10 DIFFERENT PERMISSION DETERMINES ABILITY TO IMPORT DATA

A user's ability to import data into IMATS is now determined by whether or not he/she is assigned the **Add** permission that pertains to the type of data being imported.

For example, to import suppliers, the user must be assigned the **Add Supplier** permission.

Previously, the **Import** permission was used, not the **Add** permission.

6.11 STORAGE LOCATION UPDATES

The following enhancements have been made to the **Storage Locations** feature:

- The user can now rename a storage location as long as it doesn't appear on an incomplete pick list or put away list.

- When the user adds a range of storage locations, a space is automatically added between the location name and the first level for readability.

6.12 ENHANCED UNIT OF MEASURE SETUP

When adding a unit of measure to the system, users can now assign it to multiple facilities at one time.

6.13 MODIFIED IMATS CONNECT REGISTRATION PAGE

Extraneous instructional text at the top of the page has been removed to help provide clarification. The user is now directed to contact the CTS Help Desk for help in registering his/her copy of IMATS Connect.

6.14 UPDATED FUNDING SOURCE INFORMATION ON THE SEARCH ORDERS PAGE

When a user searches for purchase orders, the results that display now include the funding source and the funding source type. Previously, the funding source was not displayed in the results.

6.15 CHANGED SORT ORDER ON THE SEARCH USERS PAGE

When the results display on the **Search Users** page, users are now sorted alphabetically by their name.

6.16 UPDATED ERROR MESSAGE WHEN IMPORTING DATA

The error message that displays when an import file is improperly formatted has been updated so that it's no longer confusing.

The message has been changed to "The file you are attempting to import is not in the proper format. Please consult Section 4.3 of the System Setup & Basics document for the proper format."

7 DESCRIPTION OF BUG FIXES

IMATS Release 1.7 contains the bug fixes described below.

7.1 EXPIRATION DATE ISSUE WHEN IMPORTING A PUSH PACKAGE FILE

When a user imports a push package file, the expiration date now gets saved to the file and imported into IMATS.

7.2 ASSIGNING A UNIT OF MEASURE WHEN ADDING AN ITEM TO A PURCHASE ORDER

Previously, when a unit of measure was added to the system during the process of adding an item to a purchase order, the unit of measure wasn't saved.

This issue has been resolved.

7.3 COUNT INVENTORY REPORT DATA ISSUE

A problem has been fixed that previously caused data to be counted twice in the Count Inventory Report.

7.4 SUPPLIER INFORMATION ON NEW PURCHASE ORDER PAGE

On the **New Purchase Order** page, the **Supplier POC** and **Phone Number** fields now automatically populate when a supplier is selected in the **Supplier** field.

7.5 EDITING A REQUEST ITEM

When a user edits an item on a product request and then attempts to navigate away from the page, a message telling the user to save the item now displays only if hasn't already been saved.

Previously, this message erroneously displayed when the item didn't need to be saved.

In addition, the **Done** button on the page has been changed to **Save** in order to alleviate any confusion.

7.6 ADDING AN EMAIL FIELD WITH AN APOSTROPHE

When a user is added to the system, the **Email** field now accepts the entry of an apostrophe.

7.7   ADDING A RANGE OF STORAGE LOCATIONS

When adding a range of storage locations to IMATS, the user no longer erroneously receives the message that the range has already been added.

7.8   ADDING AND DELETING FACILITIES

The following items have been resolved:

- A user with the **Add Facility** permission is now able to add facilities. Previously, an error displayed and the user wasn't able to add a facility.

- Facilities with no associated data can be deleted from the system.